

<b>INVITATION TO NEGOTIATE</b>		<b>LSU</b>	<b>BID DUE DATE AND TIME</b>		
BOARD OF SUPERVISORS OF LOUISIANA STATE UNIVERSITY AND AGRICULTURAL & MECHANICAL COLLEGE			<b>04/13/2021      02:00 PM      CT</b>		
<b>SOLICITATION</b> RFQ-0000001327 <b>SUPPLIER #</b> <b>SUPPLIER NAME AND ADDRESS</b> <div style="border: 1px solid black; height: 100px; width: 100%; margin-top: 10px;"></div>			<b>RETURN BID TO</b> Louisiana State University and Agricultural and Mechanical College Procurement 213 Thomas Boyd Hall Baton Rouge, LA 70803  <b>Buyer</b> Stephen Walczak <b>Buyer Phone</b> +1 (225) 578-2303 <b>Buyer Email</b> swalczak@lsu.edu <b>Issue Date</b> 03/08/2021		
<b>TITLE:</b> Cloud Based Student Enterprise Resource Planning (ERP) Software, Systems, and Services					
<b>ADDENDUM #1:</b> Notice is given to all parties that this Solicitation is amended by the University as stated herein. This Addendum is hereby made an official part of this solicitation. Supplier inquiries have been received and responses are offered per the attached. "NEW" Exhibits and Attachments to the ITN are included as part of the inquiry responses.					
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## **Addendum #1**

### **ITN-0000001327 for Cloud Based Student Enterprise Resource Planning (ERP) Software, Systems, and Services**

**Question # 1:** In reference to Section 3.1 Minimum Requirements and Qualifications - Our approach for the response will be a coordinated response between the technology solution provider (i.e. the “software provider”), who will submit a software only bid with pricing, and our recommended implementation/services partner (i.e. the “implementation partner”), who will be proposing an implementation services only proposal with pricing. Each of our responses will reference the other’s bid. The section also stipulates that the project manager for the implementation must be employed by the supplier; our proposal is that the project manager be employed by our implementation services partner. Would this response approach be acceptable to LSU and satisfy the Requirements and Qualifications?

**Answer # 1:** LSU intends to contract with one Supplier for the Solution and Services and expects one Proposal. It is permissible to subcontract, but LSU expects the project manager to be an employee of the Supplier.

**Question # 2:** We were looking to bid on this ERP RFQ and we noticed it involves Microsoft Licensing. Can you please share with us or give your permission to share LSU’s Microsoft Licensing. Understanding how LSU is licensed will help in determining a solution.

**Answer # 2:** LSU does have a Microsoft Licensing agreement, but for purposes of comparing all Responses equally, including the Financial Proposal, Respondents should assume their own partnerships or pricing strategies.

**Question # 3:** It has OCM and training listed on pages 20 and 21 but does not indicate if you would accept standalone proposals for just those services? The paragraphs at the top of Page 21 make it sound like you want a separate SOW for OCM/Training services but I wasn’t sure if that meant you are open to working with a separate vendor for those services?

**Answer # 3:** LSU intends to contract with one Supplier for the Solution and Services and expects one Proposal. It is permissible for the supplier to subcontract for these services.

**Question # 4:** On page 18, what are the different IDP’s in use currently?

**Answer # 4:** The two (2) primary IDPs in use among the various LSU institutions are Shibboleth and Microsoft Azure Active Directory (most used and preferred).

**Question # 5:** On page 18 and 19 under “Implementation Services”, what is the level of LSU support we can expect as there are many university elements which the SI’s may have challenge in accessing the Know how’s and the confidential data?

**Answer # 5:** Refer to “NEW” Attachment G – Sample LSU Resource Allocation during Implementation Services.

**Question # 6:** On page 38 under “Additional LSU Entities”, what is the tentative duration expected to extend these services to the other entities, would there be a separate procurement process?

**Answer # 6:** At this time, LSU requires a Solution for LSU A&M. Any Agreement entered into would be optional for additional LSU institutions, or Additional Participating Entities. A separate statement of work (SOW) would be negotiated with other institutions, under the master terms of this agreement. LSU cannot anticipate if/when other LSU institutions, or Additional Participating Entities, would be added.

**Question # 7:** Under “Legacy Systems”, the solution we are proposing is a strong integrated Student Accounting for AR and AP, are you open to consider such solution with reconciliation to the DI system or do you want us to keep the student accounting as it is today?

**Answer # 7:** Unless indicated in minimum requirements, all proposals will be considered to ensure we best meet the needs of LSU.

**Question # 8:** In reference to “Supplier being the Project Manager”, the question is around the Project Manager, can the PM be from the Third-Party Implementation Partner or does it have to be from the OEM who is supplying license of the COTS solution?

**Answer # 8:** LSU expects to contract with one Supplier for the Solution and Services and expects one Proposal. It is permissible to subcontract, but LSU expects the project manager to be an employee of the Supplier.

**Question # 9:** In the case where comparable capabilities are delivered as an inherent part of the proposed SIS solution, may vendors suggest replacing respective current third-party applications as opposed to integrating with them? Are there any third-party solutions currently being utilized (as listed in item 8 of Exhibit 1) that are NOT subject to replacement by the new SIS at LSU?

**Answer # 9:** All proposals will be considered that meet the requirements in section 3.1, Minimum Requirements and Qualifications.

**Question # 10:** We request clarification regarding a few areas in the ITN:

- Section 1.3 of the ITN states, “the immediate audience for this solicitation is the implementation of a Student ERP System (SIS) for the flagship Louisiana State University Agricultural and Mechanical College (LSU A&M) located in Baton Rouge, Louisiana”
- Attachment B states, "The Scope of Work outlined in this section is, in general, for LSU A&M, with the capability to be expanded to other LSU Institutions under the management of the LSU Board of Supervisors as/if the need arises in the future"
- Line 31 of the Implementation Cost Detail Tab of the Cost Sheet asks for services detailed costs for Additional Customer Entities and Additional Participating Entities

Are vendors required to price software and services proposed at this time for the flagship University only? If yes, would you please provide instruction for the Implementation Cost Detail Tab of the cost sheet? If no, please clarify all entities that should be priced?

**Answer # 10:** At this time, LSU requires a Solution for LSU A&M, with the option of adding additional LSU institutions, or Additional Participating Entities, under the same negotiated agreement with separate SOWs, without undergoing a separate competitive procurement process. LSU cannot anticipate when (or if) other LSU institutions, or Additional Participating Entities, would be added.

**Question # 11:** Will vendors selected to conduct presentations in May be offered time for additional discovery with LSU stakeholders prior to presentations?

**Answer # 11:** Per the ITN, Section 21.3 – Presentations, the University intends to invite selected respondents to oral presentations. Respondents will be provided sample scenarios to present to the evaluation team. Respondents will demonstrate the system capabilities. The presentations are anticipated to be conducted over the course of multiple days and will be recorded and become a part of this solicitation process.

**Question # 12:** Is there a compelling event for the desired go live of April 2024? Or is the University open to an earlier proposed date? Please clarify any compelling events (i.e., early registration, hardware demise, etc.) tied to this suggested date.

**Answer # 12:** LSU is open to alternative and earlier proposed go live dates, as long as the pricing and schedule are in the best interest of the university.

**Question # 13:** The ITN references an “NCAA Compliance System Replacement.” Has a solution been selected yet to replace the legacy application?

**Answer # 13:** LSU anticipates this system will be replaced by a custom solution developed by a third-party provider. Integration details are not known at this time.

**Question # 14:** Is the University open to any delivery of services being conducted onsite? Or is the expectation that all services be delivered remotely for the duration of the project?

**Answer # 14:** LSU is open to a hybrid or onsite delivery model, subject to COVID-19 guidelines and other logistical considerations. For current LSU COVID-19 guidelines, please visit <https://www.lsu.edu/roadmap/index.php>. For purposes of evaluating the cost per section 19.5, the Cost Schedule must include ALL costs associated with the Project, inclusive of travel. No reimbursement of expenses or travel will be paid to Supplier by the University.

**Question # 15:** Does the SAM system perform other identity functions beyond provisioning (password reset, MFA, SSO)?

**Answer # 15:** SAM is utilized for identity provisioning, profile/role-based access management, etc.; however, SAM does not perform SSO, or MFA. SAM does play a role in password resets.

**Question # 16:** Will the University consider separating Software Licensing/Subscription and Software Implementation Services into two separate bids/responses? For each of the major software vendors, there are multiple implementation vendors/partners that are certified implementation specialists of the

software, and can bring differences in approach and cost that can benefit LSU. This would enable implementation partners to leverage the Software Providers response where appropriate in responding to the ITN while providing alternative approaches and costing for the implementation of the software.

**Answer # 16:** Per the ITN, Section 3.1 – Minimum Requirements, H. Respondent **must** include, using the Cost Schedule provided in Attachment F, all associated costs necessary to meet the scope of services, inclusive of the Student ERP System (SIS) and any other associated software, implementation services, and training services. Respondent **must** include all one-time and recurring costs. No reimbursement of expenses or travel will be paid to Supplier by the University. Costs provided on the Cost Schedule **must** be inclusive of all mandatory specifications as defined in this solicitation, including on-site visits for implementation or training services.

**Question # 17:** Under Section 3.1 B, C, & E, will LSU consider amending these requirements to allow for a custom-built solution under a CEA?

**Answer # 17:** Per the ITN, Section 3.1 – Minimum Requirements, B. The Proposed Solution **must** provide for commercially available, off-the-shelf software with configurable functionality. Per the ITN, Section 3.1 – Minimum Requirements, C. The Respondent **must** have a minimum of five (5) years of experience in providing Software-as-a- Service (SaaS) or managed cloud-hosted solutions. As proof of meeting this requirement, the Respondent must provide LSU with the number of years Respondent has been in business and providing the proposed Student ERP System (SIS) as indicated in Response to Qualifications and Experience (Section 18.3). Per the ITN, Section 3.1 – Minimum Requirements, E. Respondent **must** provide a minimum of three (3) references of universities currently utilizing vendor's Student ERP System (SIS). As proof of meeting this requirement, Respondent must provide the reference information noted in Section 18.3.6 References.

**Question # 18:** Can LSU provide numbers of students, faculty and staff expected to use the system for each of the LSU institutions? This information is needed for software and implementation pricing.

**Answer # 18:** For evaluation purposes, Respondents should use the following estimates, which are not actual LSU IPEDS numbers:

	Students	Faculty	Staff
LSU A&M*	32,000	1,500	1,100
LSU-Alexandria	3,500	150	50
LSU-Eunice	3,000	125	30
LSU-Shreveport	8,500	200	70

\* Neither Pennington Biomedical Research Center nor LSU AgCenter & Research Stations enroll or manage students.

**Question # 19:** Can LSU provide the number of Students, Faculty and Staff using its legacy system by institution?

**Answer # 19:** The legacy mainframe system is being utilized by LSU A&M and some LSU AgCenter & Research Station faculty who hold joint appointments. Although LSU A&M, LSU Agricultural Center, LSU at Alexandria, LSU Eunice, Pennington Biomedical Research Center, and LSU Shreveport share a single Workday tenant for Finance, Human Capital Management, and Payroll, and each institution has a different Workday company designation, all LSU institutions maintain their own Student ERP Systems (SIS) and each license a different solution. For the requested user counts see question #18.

**Question # 20:** How many users does LSU expect to use the Enterprise Data Warehouse (EDW)? Should proposers make a proposal for EDW software or will LSU select this software separately?

**Answer # 20:** The Enterprise Data Warehouse (EDW) is beyond the scope of this solicitation, see also Question and Answer #26.

**Question # 21:** We are unable to locate Sections 18.3 and 18.3.6 which provide forms for references.

**Answer # 21:** References to sections 18.3 and 18.3.6 should be replaced in their entirety with sections 19.3 and 19.3.5, respectively.

**Question # 22:** Each institution is separate and distinct. We have some clarifying questions with regard to this:

- A. Is the IPEDS report filed for LSU as a whole or separately by each institution? Which other regulatory reporting is performed by each institution?
- B. Is financial aid reporting handled separately by each institution?
- C. Do any users need to access the systems of multiple institutions?
- D. If yes, do they see separately branded screens for each institution?

**Answer # 22, #A:** The federal government (IPEDS) sees LSU Agricultural & Mechanical College (LSU) as comprising LSU Baton Rouge, Pennington Biomedical Research Center, and LSU AgCenter & Research Stations. LSU reports a combined number for these institutions for IPEDS purposes. All other LSU institutions report separately. See "NEW" Attachment H – Sample of LSU's Other Regulatory Reporting.

**Answer # 22, #B:** Yes, financial aid reporting is handled separately by each institution.

**Answer # 22, #C:** In general, the only users who will access systems of multiple institutions are those who are participating under a formal data sharing agreement between institutions.

**Answer # 22, #D:** Yes, each institution has its own separate Student ERP System (SIS), and each is branded according to that institution.

**Question # 23:** There are a number of LSU student-related legacy applications that are mentioned in the ITN in Exhibit 1. Which systems does LSU want to replace with the proposer's offerings? Is it only those identified in Section 6 of Exhibit 1 or do other systems not mentioned in Exhibit 1 also need to be considered in scope for the ITN?

**Answer # 23:** Respondents are to delete Exhibit 1, Section 6 and replace with attached "NEW" Exhibit 3.

**Question # 24:** Which agent/third-party integrations are considered in scope of the ITN? This information is required for estimation of integration services.

**Answer # 24:** Respondents are to review and incorporate "NEW" Exhibit 4 – Integration List for LSU A&M into their response.

**Question # 25:** Please list the custom enterprise integrations that need to be retained and reimplemented in the proposed system?

**Answer # 25:** Respondents are to review and incorporate "NEW" Exhibit 4 – Integration List for LSU A&M into their response.

**Question # 26:** Please provide details of the data being mined by agents of the University from Enterprise tables. This will enable planning of Enterprise data provisioning capability and pricing.

**Answer # 26:** All legacy mainframe data is currently replicated to distributed servers (Linux DB2 and SQL Server systems) and then used for business intelligence purposes in ad hoc and compliance reporting and data visualization environments, as well as fed to satellite custom application development environments where relevant applications make use of it. The data is also used for many outbound integrations, which are delineated in attached Exhibit 4. While LSU does not currently utilize a purpose-built Enterprise Data Warehouse, the University anticipates historical and future Student ERP System (SIS) data being migrated, likely using replication or other data integration technologies as yet to be determined, into a cloud-based enterprise data warehouse service, likely housed with a value-add vendor in a public cloud such as Azure or AWS. The proposed Solution should facilitate, or at least not present obstacles to, these multiplatform efforts.

**Question # 27:** Does the University prefer Red Hat Linux in the new environment or will other flavors of Linux work?

**Answer # 27:** For any scenario where LSU personnel might have to manage the Solution at the operating system level, if the system is Linux based, LSU would prefer Red Hat or something in its distribution "family", such as CentOS. Windows Server based systems, if applicable, would also be acceptable.

**Question # 28:** Will all the applications in Exhibit 1 Section 6 be replaced or will any of them need to be retained and require integrations?

**Answer # 28:** Respondents are to delete Exhibit 1, Section 6 and replace with attached “NEW” Exhibit 3. Additionally, Respondents are to review and incorporate “NEW” Exhibit 4 – Integration List for LSU A&M into their response.

**Question # 29:** Will the CRM systems for undergraduate and graduate recruitment be retained or replaced? Will they be integrated to the new SIS?

**Answer # 29:** For LSU A&M, these systems will be retained and will need to be integrated to the new Student ERP System (SIS). If Respondents provide Recruiting and Admissions functionality in the core Student ERP System (SIS), please include such in the Proposal including Financial Proposal for consideration.

**Question # 30:** Will the Advanced Standing system be retained or replaced if advanced standing can be handled in the new SIS?

**Answer # 30:** Refer to “NEW” Exhibit #3. The Respondent should address this functionality, if applicable.

**Question # 31:** Will the Athletics system be retained or replaced?

**Answer # 31:** LSU anticipates this system will be replaced by a custom solution developed by a third-party provider. Integration details are not known at this time.

**Question # 32:** Will the Board of Regents system be retained or replaced if this type of reporting can be handled in the new SIS?

**Answer # 32:** Refer to “NEW” Exhibit #3. The Respondent should address this functionality, if applicable.

**Question # 33:** Will the Communication Across Curriculum system be retained or replaced the functionality can be handled in the new SIS?

**Answer # 33:** Refer to “NEW” Exhibit #3. The Respondent should address this functionality, if applicable.

**Question # 34:** Will the Degree Audit system be retained or replaced if degree audit functionality can be provided in the new SIS?

**Answer # 34:** Refer to “NEW” Exhibit #3. The Respondent should address this functionality, if applicable.

**Question # 35:** Will the University Directory system be retained or replaced if student directory information can be handled in the new SIS?

**Answer # 35:** LSU A&M will replace this legacy functionality. The Respondent should address this functionality, if applicable. In addition, the University will maintain an external repository for all directory information (beyond students) to ensure we meet the requirements of our Identity and Access Management program.

**Question # 36:** Will the Document Routing and Approval system be retained or replaced if student directory information can be handled in the new SIS?

**Answer # 36:** Refer to “NEW” Exhibit #3. The Respondent should address this functionality, if applicable.

**Question # 37:** Will the Graduate School system be retained or replaced if student directory information can be handled in the new SIS?

**Answer # 37:** Refer to “NEW” Exhibit #3. The Respondent should address this functionality, if applicable.

**Question # 38:** Will the ID Card system be retained or replaced? Will it be integrated to the new SIS for Student ID Cards?

**Answer # 38:** Refer to “NEW” Exhibit #3. The Respondent should address this functionality, if applicable.

**Question # 39:** Will the Independent Study system be retained or replaced if independent studies can be handled in the new SIS?

**Answer # 39:** Refer to “NEW” Exhibit #3. The Respondent should address this functionality, if applicable.

**Question # 40:** Will the Intersession system be retained or replaced if intersessions can be handled in the new SIS?

**Answer # 40:** Refer to “NEW” Exhibit #3. The Respondent should address this functionality, if applicable.

**Question # 41:** Will the Job Scheduling system be retained or replaced if job scheduling can be handled in the new SIS?

**Answer # 41:** Refer to “NEW” Exhibit #3. The Respondent should address this functionality, if applicable.

**Question # 42:** Will the Law School system be retained or replaced if student data for the law school can be handled in the new SIS?

**Answer # 42:** Refer to “NEW” Exhibit #3. The Respondent should address this functionality, if applicable.

**Question # 43:** Will the Mediat system be retained or replaced if student data for the medical school can be handled in the new SIS?

**Answer # 43:** Refer to “NEW” Exhibit #3. The Respondent should address this functionality, if applicable.

**Question # 44:** Will the MyProxy system be retained or replaced? If it is retained, is there an expectation that users should be able to access the proposed SIS as proxies for another user.

**Answer # 44:** Refer to “NEW” Exhibit #3. The Respondent should address this functionality, if applicable.

**Question # 45:** Will the Personal Access Web Services system be retained or replaced if web access can be managed in the new SIS? Will it need to be integrated to the new system?

**Answer # 45:** Refer to “NEW” Exhibit #3. The Respondent should address this functionality, if applicable.

**Question # 46:** Will the Printer Management system be retained or replaced if printers can be managed in the new SIS? Will it need to be integrated to the new system?

**Answer # 46:** Refer to “NEW” Exhibit #3. The Respondent should address this functionality, if applicable.

**Question # 47:** Will the Registration system be retained or replaced if registration can be handled in the new SIS?

**Answer # 47:** Refer to “NEW” Exhibit #3. The Respondent should address this functionality, if applicable.

**Question # 48:** Will the Residence Life/StarRez system be retained or replaced? Will it need to be integrated to the new system?

**Answer # 48:** Refer to “NEW” Exhibit #3. The Respondent should address this functionality, if applicable.

**Question # 49:** Will the Security Access Management system be retained or replaced if security roles can be handled in the new SIS? Will it need to be integrated to the new system?

**Answer # 49:** Even if security roles can be managed within the Student ERP System (SIS), the Security Access Management system will need to be replaced to ensure we can have a broader implementation of authentication and authorization beyond the Student ERP System (SIS). Additionally, due to the utilization of Single Sign On, some aspects of access management may be addressed outside of Student ERP System (SIS). The new system will need to be integrated with the legacy Security Access Management system, or – preferably – a replacement system not yet identified.

**Question # 50:** Will the Student Aid system be retained or replaced if financial aid can be handled in the new SIS? Will it need to be integrated to the new system?

**Answer # 50:** Refer to “NEW” Exhibit #3. The Respondent should address this functionality, if applicable.

**Question # 51:** Will the Student Degree Advising (CATS) system be retained or replaced if degree advising can be handled in the new SIS? Will it need to be integrated to the new system?

**Answer # 51:** Refer to “NEW” Exhibit #3. The Respondent should address this functionality, if applicable.

**Question # 52:** Will the Student Loan Management system be retained or replaced if student loans can be handled in the new SIS? Will it need to be integrated to the new system?

**Answer # 52:** Refer to “NEW” Exhibit #3. The Respondent should address this functionality, if applicable.

**Question # 53:** Will the Treasurer Information system be retained or replaced if student receivables can be handled in the new SIS? Will it need to be integrated to the new system?

**Answer # 53:** Refer to “NEW” Exhibit #3. The Respondent should address this functionality, if applicable.

**Question # 54:** Will student refunds continue to be issued from Workday Expense or can they be issued from the new SIS?

**Answer # 54:** LSU A&M expects all refunds to be handled by the new Student ERP System (SIS) and is open to alternative proposals. Currently, LSU A&M does not utilize Workday Expense for student refunds.

**Question # 55:** Section 8 mentions examples of integrations. Can LSU provide a complete list of integrations?

**Answer # 55:** Respondents are to review and incorporate “NEW” Exhibit 4 – Integration List for LSU A&M into their response.

**Question # 56:** Is LSU open to a dialog around the current applications and how they may be transitioned to the new SIS to further clarify scope?

**Answer # 56:** Refer to “NEW” Exhibit #3. The Respondent should address this functionality, if applicable.

**Question # 57:** Does LSU want the proposer to include Organizational Change Management services? How does LSU expect to handle change management?

**Answer # 57:** LSU expects the Respondent to propose how they would handle change management, including Organizational Change Management. If you propose to offer this service, please include as an option in the Other Costs section of the Financial Proposal.

**Question # 58:** Is LSU expecting to the proposer to deliver training or is it sufficient for us to train LSU’s employees as trainers?

**Answer # 58:** LSU expects the Respondent to propose how they would handle training. If Respondent training delivery as a service, please include in the applicable Training Costs line item in section 1, Cost Summary of Attachment F, Cost Schedule.

**Question # 59:** How many resources does LSU expect to provide to work on the implementation?

**Answer # 59:** Refer to “NEW” Attachment G – Sample LSU Resource Allocation during Implementation Services.

**Question # 60:** Does LSU have standing contract arrangements with hyperscale cloud providers or should proposers use their own partnerships?

**Answer # 60:** LSU does have contracts with both Microsoft and AWS, but for purposes of comparing all Responses equally, including the Financial Proposal, Respondents should assume their own

partnerships will be utilized.

**Question # 61:** Is LSU expecting security in accordance with NIST 800-171 at the “moderate” level?

**Answer # 61:** NIST 800-171 is a standard LSU is working towards due to compliance requirements.

**Question # 62:** Will you allow us to confirm our Services assumptions with your team prior to submission? If not, will we be able to meet with the team prior to the best and final offer?

**Answer # 62:** As stated in the ITN, Section 19.4.1 “Services and Deliverables”, The Implementation Services; Training and Education included in this ITN not final and it is anticipated that a statement of work will be required based on the needs and expectations of LSU A&M, therefore, we reserve the right to negotiate during the Best and Final Offer with the Respondent(s) to determine the implementation and training plan that meets the best overall approach and value for LSU A&M. If additional implementation services or training sessions are needed beyond the initial scope of this ITN for LSU A&M, other LSU Institutions, or Additional Participating Entities, those would be negotiated with the awarded Supplier based on not to exceed pricing for Key Personnel provided in the Cost Schedule (Attachment F – Table #5 “Resource Detail”).

**Question # 63:** Is the expectation that the vendor would supply all the integrations listed or would LSU take on this responsibility?

**Answer # 63:** LSU expects Respondents to propose what integrations will be included versus those for which LSU should be responsible. Refer to “NEW” Exhibit #4.

**Question # 64:** Regarding CRM to support student engagement, how many full access users (able to configure the system, update settings/workflows, create and manage campaigns/communication plans, use live chat, write reports, other higher-level functions) do you anticipate will access the solution?

**Answer # 64:** For the multiple CRM solutions currently in use at LSU A&M, there are approximately 225 users who can configure the system, update settings/workflows, create and manage communications/campaigns, use live chat, write reports and other high-level functions. We need to have the ability to define full access administrative users with configuration access.

**Question # 65:** Regarding CRM to support student engagement, how many limited access users (only able to update contact data fields, add notes, and run pre-written reports) do you anticipate will access the solution?

**Answer # 65:** For the multiple CRM solutions currently in use at LSU A&M, there are approximately 150 users who can update data fields, add notes, and run reports of their own. With LSU’s current system some of these users are not “limited”, in that they can also create their own reports, and some can use the live chat function along with other higher-level functions specific to their job responsibilities.

**Question # 66:** Regarding CRM to support student engagement, how many chat users do you anticipate will access the solution?

**Answer # 66:** For the multiple CRM solutions currently in use at LSU A&M, there will be approximately 200 chat users. In addition, there are several channels of communication with students, including texting, chat, phone calls and email. Currently, texting is the highest usage with the recruiting and retention staff having approximately 1500 text conversations with students per month.

## **ATTACHMENT G – SAMPLE LSU RESOURCE ALLOCATION DURING IMPLEMENTATION SERVICES**

### Project Team

- Project Leadership – 4 FTE at no more than 25% of normal work hours
- Program Manager - 1 FTE loaded at no more than 75% of normal work hours
- Project Manager - 3 FTE loaded at no more than 75% of normal work hours
- Business Analysts – 2 FTE loaded at no more than 75% of normal work hours

### Team Leads

- Institution Engagement - 1 FTE loaded at no more than 20% of normal work hours
- Recruiting and Admissions - 1 FTE loaded at no more than 20% of normal work hours
- Student Records Business Processes - 1 FTE loaded at no more than 75% of normal work hours
- Financial Aid - 1 FTE loaded at no more than 20% of normal work hours
- Student Financials - 1 FTE loaded at no more than 20% of normal work hours
- Reporting - 1 FTE loaded at no more than 20% of normal work hours
- Technical Lead (integrations, data migration, security) – 1 FTE loaded at no more than 50% of normal work hours
- Testing - 1 FTE loaded at no more than 50% of normal work hours

### Subject Matter Experts (i.e. Workstreams)

- Institution Engagement – 1 FTE loaded at no more than 20% of normal work hours
- Recruiting and Admissions – 5 FTE loaded at no more than 20% of normal work hours
- Student Records Business Processes (Registration, Student Records, Curriculum Management, Academic Foundation, Academic Advising) – 7 FTE loaded at no more than 20% of normal working hours
- Financial Aid – 5 FTE loaded at no more than 20% of normal work hours
- Student Financials - 4 FTE loaded at no more than 20% of normal work hours
- Reporting – 6 FTE loaded at no more than 80% of normal work hours
- Integrations – 8 FTE loaded at no more than 80% of normal work hours
- Data Migration – 4 FTE loaded at no more than 50% of normal work hours
- Security – 6 FTE loaded at no more than 20% of normal work hours
- Testing - 1 FTE loaded at no more than 50% of normal work hours

## **ATTACHMENT H – SAMPLE OF LSU’S OTHER REGULATORY REPORTING**

- Louisiana Board of Regents
- National Science Foundation
- The Southern Association of Colleges and Schools Commission on Colleges (SACSCOC) (
- Specialized accreditation for specific degree programs. Examples include:
  - AACSB – International Association for Management Education
  - ABA – American Bar Association
  - ABET – Accreditation Board for Engineering and Technology
  - ACCE – American Council for Construction Education
  - ACEND – Academy of Nutrition and Dietetics
  - ACEJMC – Accrediting Council on Education in Journalism and Mass Communications
  - ACS – American Chemical Society
  - ALA – American Library Association
  - APA – American Psychological Association
  - AVMA – American Veterinary Medicine Association
  - CAA – Council on Academic Accreditation- Audiology / Speech-Language Pathology
  - CAATE - Commission on Accreditation of Athletic Training Education
  - CACREP – Accreditation of Counseling and Related Education Programs
  - CAEP – Council for the Accreditation of Educator Preparation
  - CAMPEP – Commission on Accreditation of Medical Physics Education Programs
  - CIDA – Council for Interior Design Accreditation
  - COSMA - Commission on Sport Management Accreditation
  - CSWE - Council on Social Work Education
  - LAAB – Accreditation and Landscape Architectural Accreditation Board
  - NAAB – National Architectural Accrediting Board
  - NASAD – National Association of Schools of Art & Design
  - NASM – National Association of Schools of Music
  - NASPAA – Network of Schools of Public Policy, Affairs, and Administration
  - NAST – National Association of Schools of Theatre
  - SAF – Society of American Foresters
- U.S. Selective Service System
- National Collegiate Athletic Association (NCAA)
- National Student Loan Data System (NSLDS)

### EXHIBIT 3 - APPLICATION INVENTORY

Application Name	Acronym	Brief Application Description	Application Functions	Replace with new SIS
<b>Admissions</b>	ADM	Once students are recruited and admitted through the respective CRM system for Undergraduate Admissions and Graduate School, data feeds load students to this system and students matriculate from here. The system also stores data from third-party feeds from VMCAS for the School of Veterinary Medicine and LSAC for the Law School.	Undergraduate, Law and Graduate School admissions to the University; Receives transfer credit and transcript data.	Yes
<b>Admissions History</b>	ADH	Manages applicant records that are moved from the Admission system.	During each semester processes run to move applicant data from the admissions system to history.	Yes
<b>Advance Billing</b>	ABS	Creates bills for student tuition for registered courses.	Assessment of student fees; Student Billing awards/exemption processing for students.	Yes
<b>Advanced Standing</b>	ADV	Credit received by students to apply toward the achievement of their degree.	Loads advance standing exams scores to database; Manages orientation sessions for UG and transfer students throughout semester.	Yes
<b>Athletics</b>	ATH	Captures the certification of athletes to participate in specific sports.	Athletic certification; scholarship information; Manages academic success; Correspondence.	No (Will need to integrate to a custom solution TBD.  See "NEW" Exhibit 4 -Integration list for LSU A&M)

<b>Board of Regents</b>	BOR	Generates reports for the Louisiana State Board of Regents.	Completers profile submitted to Board of Regents; Student financial aid data submitted to Board of Regents.	Yes
<b>Communication Across the Curriculum</b>	CXC	Manages students in the Communication across the Curriculum discipline.	Enrollment of instructors/professors; Certification of courses that meet requirements are approved.	Yes
<b>Degree Audit</b>	DAU	Manages the process for a Student Degree Audit.	Advising; List degree requirements for degrees; Manages student progress toward their degree.	Yes
<b>University Directory<sup>1</sup></b>	DIR	Centralized name and address information for staff, faculty and students and other individuals associated with the University.	Self-service address view/update; SSN/LSUID Merge.	No (Will need to integrate with IDM 3 <sup>rd</sup> party solution TBD.  See “NEW” Exhibit 4 -Integration list for LSU A&M)
<b>Document Routing and Approval</b>	DRA	Manages approval workflow processes.	Self-service administration security profile update; Integration with workflow approval.	No (Will need to integrate with enterprise content management 3 <sup>rd</sup> party solution TBD.  See “NEW” Exhibit 4 -Integration list for LSU A&M)
<b>File Management System</b>	FMS	Manages metadata of digital files	Stores Metadata of digital files for university offices on campus	No (Will need to integrate with enterprise content management 3 <sup>rd</sup> party solution TBD.

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<sup>1</sup> Please see a more detailed description of this application in the ITN section labeled **Additional Information on Select Applications.**

				See "NEW" Exhibit 4 -Integration list for LSU A&M)
<b>Graduate School</b>	GRD	Manages the process of graduate records.	Admission decisions; Test score retrieval; Records processing.	Yes
<b>Identification Cards</b>	IDC	Manages the creation and maintenance of ID cards for both LSU employees and students.	Create and manage unique ID cards records; integrates with Student Records database; integrates with Blackboard Transaction ID card system	Yes (The legacy ID Card system will be decommissioned and the current Blackboard Transact solution will be integrated directly with the new Student ERP System (SIS).  See "NEW" Exhibit 4 -Integration list for LSU A&M)
<b>Independent Study</b>	IND	Manages students independent study processes.	Import/export students to independent student database and/or student records database; Produces grades sheets; Course enrollment reports.	Yes
<b>Infonet</b>	INF	Produces schedule booklet	Data from the student record database is used in the system to create schedule booklets	Yes
<b>Intersession</b>	INT	Manage student records processes for summer, fall and spring intersession semesters.	Batch jobs that produce class management reports; Low enrollment reports; Loads query tables for Budget and Planning.	Yes
<b>Job Scheduling</b>	JOB	Web enabled application that will allow the LSU community to request batch processes of production control.	Scheduling enabled for authorized requestors.	Yes (The legacy Job Scheduling system will be decommissioned, and schedules will be handled in the new SIS).

<b>Law School</b>	LWS	Manages Student information for the Law School.	Admission decisions; Records processing; Law Alumni management.	Yes
<b>Medicat</b>	MED	Tracks student health for individuals while at the Institution.	Manages patient data, including encounters, appointments, pharmacy, mental health, and other medical components; Interfaces to Accounts Receivable for posting of charges/credits. Demographic file interface drawn from HR and student data.	No (Medicat is used by the Student Health Center at LSU A&M and will not be replaced.  See “NEW” Exhibit 4 -Integration list for LSU A&M)
<b>MyProxy</b>	MYP	Provides infrastructure for third party access to sign on to the LSU network.	Online process to request Proxy identity; Establishment of proxy-LSU user relationship; Assignment of resources to proxy user on behalf of LSU user.	Yes
<b>Personal Access Web Services</b>	PWS	Provides a service to allow employees and/or students to manage their access Ids.	Self-service maintenance of institutional access IDs; Online access to enterprise portal; Management of online resource links.	No (Will need to integrate with Personal Access Web Services portal 3 <sup>rd</sup> party solution, Unified Engage.  See “NEW” Exhibit 4 -Integration list for LSU A&M)
<b>Printer Management</b>	IRM	Manages the printer distribution and configuration for all ITS applications.	Printer management for mainframe printing.	Yes (The Printer Management system is mainframe-specific and will be decommissioned).
<b>Registration</b>	REG	Manages the course inventory for each semester.	Updates course offering website; Loads 3 <sup>rd</sup> party application with courses; Course/Sections creation process; Freezes enrollment totals for specified semesters.	Yes

<b>Residential Life / StarRez</b>	REZ	Mainframe interface between StarRez vended solution and mainframe Student Records for system look-up of student's residential and related student life activities.	Enables student residential and activities data look-up for legacy SIS processes.	No (Will need to integrate with StarRez 3 <sup>rd</sup> party solution.  See "NEW" Exhibit 4 -Integration list for LSU A&M)
<b>Security Access Management</b>	SAM	Enterprise infrastructure tool to manage security access and authorization across applications.	Legacy and external applications log pertinent transactions to SAM, triggering SAM rules that assign identities to user profiles, which then are leveraged by legacy systems or fed to external systems to provision application authorizations.	No (Will need to integrate with legacy SAM or – preferably – a replacement IDM 3 <sup>rd</sup> party solution TBD.  See "NEW" Exhibit 4 -Integration list for LSU A&M)
<b>Student Aid</b>	FAD	Manages process to provide financial aid to students.	Student financial aid awarding; Packaging; Scholarship processing; Federal aid processing.	Yes
<b>Student Award Entry</b>	SAE	Manages departmental scholarship processes	Departmental scholarship processes are routed for approval and paid to the student.	Yes
<b>Student Degree Advising (CATS)</b>	SDA	Tracks student progress towards achieving target degree(s) and provides advice, where needed.	Degree requirements input; Tracking students against these requirements; Places a hold on student schedules; Creates email broadcast group.	Yes
<b>Student Loan Management</b>	SLM	Tracks student loans that are past due. To be replaced by external vended solution before new SIS go-live. (anticipated)	1098-E processing; Receipt of payments via lockbox with interfaces to General Ledger; Generation of bills and correspondence; Tracking of delinquency.	No (Will need to integrate with new 3 <sup>rd</sup> party solution which is TBD.  See "NEW" Exhibit 4 -Integration list for LSU A&M)

<b>Student Records</b>	SRR	Core system for managing the LSU Student information.	Scheduling courses; Add/Drop courses; Graduation; Degree information; Advising; Grade posting; Admissions “roll” of student information to the student records database.	Yes
<b>Student Test Scores</b>	STS	Captures all test scores handled by the university.	Stores test scores of the following but not limited to, (ACT, SAT, TOEFL, etc.)	Yes
<b>Treasurer Information<sup>2</sup></b>	TIS	Financial system to track the university’s Accounts Receivable and current assets.	A/R; Agreement/Sponsor handling for treasury customers of all types (students, employees, drivers, patrons, etc.); Billing on a monthly basis for A/R.	Yes

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<sup>2</sup> Please see a more detailed description of this application in the ITN section labeled **Additional Information on Select Applications**.

## EXHIBIT 4 - INTEGRATION LIST FOR LSU A&M

System	Data Description	Direction	Entity/Vendor
Accounts Receivable/Student Financials	1098-E Tax Reporting	Outbound	Federal
Accounts Receivable/Student Financials	1042-S Tax Reporting	Outbound	Federal
Accounts Receivable/Student Financials	1098-T Tax Reporting	Outbound	Federal
Accounts Receivable/Student Financials	Accounts Receivable Auditor Transmit	Outbound	State Agency
Accounts Receivable/Student Financials	ACH Detail Received from JSA	Inbound	JSA
Accounts Receivable/Student Financials	ACH Drafts for Accounts Receivable Payments	Outbound	JPMorgan/Chase
Accounts Receivable/Student Financials	Credit Card Payments	In and Out	JPMorgan/Chase
Accounts Receivable/Student Financials	Direct Deposit for Credit Balance Refunds of Accounts Receivable	Outbound	JPMorgan/Chase
Accounts Receivable/Student Financials	Lockbox Payment Processing (student Loan payments, Accounts Receivable, Student Billing)	Inbound	JPMorgan/Chase
Accounts Receivable/Student Financials	General Ledger Entry with Accounts Receivable, Deposit and Method of Payment Detail Load (multiple sources)	Outbound	Workday
Accounts Receivable/Student Financials	E-Commerce/Cashiering System	Bi-directional	CashNet
Accounts Receivable/Student Financials	Parking Office	Bi-directional	T2
Accounts Receivable/Student Financials	Payment Processor	Bi-directional	Elavon
Accounts Receivable/Student Financials	Payment Processor (International)	Bi-directional	Flywire

<b>Accounts Receivable/Student Financials</b>	Collection Agency	Outbound	Collection Agency
<b>Accounts Receivable/Student Financials</b>	Student loan data sent to credit bureau	Outbound	Credit Bureau
<b>Accounts Receivable/Student Financials</b>	Dept. of Education loan file	Outbound	Department of Education
<b>Accounts Receivable/Student Financials</b>	Gallagher Insurance for international Students	Outbound	Gallagher portal
<b>Accounts Receivable/Student Financials</b>	G5 Drawdowns	Outbound	Department of Education
<b>Accounts Receivable/Student Financials</b>	Fiscal Operations Report and Applications to Participate (FISAP)	Outbound	Department of Education
<b>Accounts Receivable/Student Financials</b>	Tiger Card Meal Plan	Outbound	Tiger Card Office (University)
<b>Accounts Receivable/Student Financials</b>	Perkins Loan reporting to NSLDS	Outbound	Department of Education
<b>Accounts Receivable/Student Financials</b>	Student Loan Management (anticipated)	Bi-Directional	TBD
<b>Accounts Receivable/Student Financials</b>	Graduate Assistants data	Inbound	Workday
<b>Financial Aid</b>	ISIR	Bi-directional	Department of Education / CPS
<b>Financial Aid</b>	State scholarship program (TOPS)	Bi-directional	State of Louisiana
<b>Financial Aid</b>	Student and scholarship data	Bi-directional	Academic Works - Blackbaud Award Management
<b>Financial Aid</b>	Enrollment verification	Outbound	State Agency
<b>Financial Aid</b>	Common Origination and Disbursement Loans	Bi-directional	TD Access
<b>Financial Aid</b>	Direct Loan	Inbound	Student Aid Internet Gateway
<b>Financial Aid</b>	Entrance Counseling File	Inbound	Dept. of Education
<b>Financial Aid</b>	External Award File	Inbound	External Scholarships Organizations
<b>Financial Aid</b>	Federal Grant Reconciliation	Inbound	Federal Ed-Connect

<b>Financial Aid</b>	Federal Transfer Monitoring Process	Inbound	Dept. of Education
<b>Financial Aid</b>	Generates file of financial aid and scholarship award amounts	Outbound	Board of Regents
<b>Financial Aid</b>	Go Grant processing	Bi-directional	State Agency
<b>Financial Aid</b>	Creates file of Grant disbursements and originations	Outbound	Common Origination and Disbursement
<b>Financial Aid</b>	Loan Processing	Outbound	Common Origination and Disbursement
<b>Financial Aid</b>	Negative Disbursements	Inbound	Student Aid Internet Gateway
<b>Financial Aid</b>	Pell Processing	Bi-directional	Student Aid Internet Gateway
<b>Financial Aid</b>	Student Aid Internet Gateway mailbox cleanup	Inbound	Student Aid Internet Gateway
<b>Financial Aid</b>	Information for students awarded TEACH Grants	Bi-directional	Student Aid Internet Gateway
<b>Financial Aid</b>	Work Study/Presidents Award	Outbound	Workday
<b>Financial Aid</b>	Checklist of electronic and paper documents received in enterprise content management system	Inbound	Hyland NoliWeb (to be replaced with new solution TBD)
<b>Identity Management</b>	Account authentication and authorization processes; Directory, Document Routing Approval (DRA) (anticipated)	Bi-directional	TBD
<b>Recruiting / Admissions</b>	Various test scores (Ex. ACT, SAT, Compass, Accuplacer, IELTS, etc....)	Inbound	College Board
<b>Recruiting / Admissions</b>	Pearson Test of English	Inbound	Pearson Vue
<b>Recruiting / Admissions</b>	Undergraduate Admissions and Graduate School CRMs (2 separate tenants)	Bi-directional	Slate
<b>Recruiting / Admissions</b>	Louisiana High School Transcript Data	Inbound	Louisiana Board of Regents
<b>Recruiting / Admissions</b>	SPEEDE Transcript Data	Inbound	National Student Clearinghouse
<b>Recruiting/Admissions</b>	Retention	Outbound	EAB
<b>Student Records</b>	AP Scores	Inbound	College Board
<b>Student Records</b>	Emergency Communications System	Outbound	RAVE
<b>Student Records</b>	Athletics NCAA Compliance	Bi-directional	Custom
<b>Student Records</b>	University Recreation Center	Outbound	LSU
<b>Student Records</b>	International Student Reporting (bio/demographic data)	Bi-directional	SEVIS - Federal Government
<b>Student Records</b>	International Student Reporting (bio/demographic data) (anticipated)	Bi-directional	Sunapsis
<b>Student Records</b>	Career Services, student jobs	Bi-directional	Handshake
<b>Student Records</b>	Textbook Integration	Outbound	Barnes & Noble

<b>Student Records</b>	Class and Room Scheduling	Bi-directional	CollegeNet
<b>Student Records</b>	Course Catalog	Outbound	Acalog
<b>Student Records</b>	ID Card System	Bi-directional	Blackboard Transact
<b>Student Records</b>	Security Access Management (SAM)	Bi-directional	LSU
<b>Student Records</b>	Document Imaging/File Management System (anticipated)	Bi-directional	Hyland
<b>Student Records</b>	Learning Management System	Bi-directional	Moodle
<b>Student Records</b>	Undergraduate Admissions and Graduate School CRMs (2 separate tenants)	Bi-directional	Slate
<b>Student Records</b>	LSU Online CRM	Outbound	Salesforce
<b>Student Records</b>	Law School Admissions	Inbound	LSAC
<b>Student Records</b>	Student Health Center	Bi-directional	Medicat
<b>Student Records</b>	Residential Life Housing	Bi-directional	StarRez
<b>Student Records</b>	Transcript OCR Data (anticipated)	Bi-directional	Hyland
<b>Student Records</b>	Veterans Administration	Bi-directional	Federal
<b>Student Records</b>	Judicial Access Management System	Outbound	Maxient
<b>Student Records</b>	Student Success (advising, retention)	Outbound	EAB
<b>Student Records</b>	Center for Academic Success Tutoring	Outbound	TutorTrac
<b>Student Records</b>	Study Abroad	Outbound	TerraDotta
<b>Student Records</b>	Transcript Processing	Outbound	Parchment
<b>Student Records</b>	Online test taking	Outbound	Proctor U
<b>Student Records</b>	Testing & Assessments	Outbound	QuestionMark
<b>Student Records</b>	Tracking student learning outcomes	Outbound	Taskstream
<b>Student Records</b>	Vet School Admissions	Inbound	VMCAS
<b>Student Records</b>	Ticketed event eligibility	Outbound	Tiger Card Office (University)
<b>Student Records</b>	Student organizations	Outbound	TigerLink
<b>Student Records</b>	Graduate file sent to university communications departments	Outbound	Local newspapers
<b>Student Records</b>	Course evaluation software	Inbound	Blue Explorance
<b>Student Records</b>	Sorority and fraternity recruitment	Outbound	Campus Director
<b>Student Records</b>	Communication with students and university recreation customers.	Outbound	Constant Contact
<b>Student Records</b>	Vita management software	Outbound	Digital Measures
<b>Student Records</b>	Software to print diplomas	Outbound	Diploma printing on demand
<b>Student Records</b>	Facilities Management	Outbound	FAMIS
<b>Student Records</b>	Football Ticket student eligibility	Outbound	Paciolan
<b>Student Records</b>	Athlete tutoring scheduling app	Outbound	GradesFirst
<b>Student Records</b>	Current term graduates	Outbound	Blackbaud
<b>Student Records</b>	Integrate with Board of Regents Inventory of Degree and Certificate Programs (CRIN)	Inbound	Board of Regents

<b>Student Records</b>	Library file to determine who can check out books from the library	Outbound	Library Patron
<b>Student Records</b>	Manages Continuing Education student records	Outbound	Jenzebar
<b>Student Records</b>	University recreational center sport team scheduling, sign up application	Outbound	IMLeagues
<b>Student Records</b>	Capture and credit learner's digital micro-credentials at all levels (anticipated)	Outbound	TBD
<b>Student Records</b>	Currently enrolled and graduating student files; Degrees awarded	Outbound	National Student Clearing House
<b>Student Records</b>	Test scores received from ALEKS (Assessment and Learning in Knowledge Spaces)	Bi-directional	Assessment and Learning in Knowledge Spaces (ALEKS)
<b>Student Records</b>	Manage Student Life activities	Outbound	Collegiate Link
<b>Student Records</b>	Faculty and Student Portal (i.e., Personal Access Web Services)	Outbound	Unifyed
<b>Student Records</b>	Student Status	Outbound	Workday
<b>Student Records</b>	Instructor Course Load	Outbound	Faculty 360
<b>Student Records</b>	Student Demographic	Outbound	ITSM Team Dynamix
<b>Student Records</b>	Student Demographic	Outbound	Navex
<b>Student Records</b>	Communication with Students	Outbound	OmniUpdate ECM Email Campaign
<b>Student Records</b>	Determination if student is registered for Selective Service	Inbound	Selective Service
<b>Student Records</b>	Grade Correction Request	Inbound	K2 Custom Application
<b>Student Records</b>	Faculty Credentialing	Inbound	K2 Custom Application
<b>Student Records</b>	Employee demographic – Instructor Assignment/Student Worker Information	Inbound	Workday
<b>Student Records</b>	Enterprise Content Management system housing current and historical student records documents	Bi-directional	Hyland NoliWeb and IBM Content Manager (to be replaced with new solution TBD)
<b>Student Records</b>	Student demographic for School of Social Work (anticipated)	Outbound	TBD
<b>Student Records</b>	Student demographic for Campus Life (anticipated)	Bi-directional	TBD